Bid Management

Release 8.6.4 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.4 (Eterm) Online Help System

Publication Date: December 5, 2008

Table Of Contents

Sales Management Overview

Use Eclipse to manage every aspect of a sale, from the moment it is quoted until the day it is invoiced.

Flexible Searching

Look up customers, vendors, transactions, and products by virtually any identifier.

- Find customers and vendors by any part of a company name, phone number, or keyword.
- Find transactions by order number, product, customer PO number, or shipping address.
- Find products by UPC number, product description, size, color, or manufacturer.

Numerous Product Entry Options

When entering products on sales orders, change your screen view to see any number of details about order items. Create non-stocks, access substitute and add-on products, or add recently ordered products to the current order. Robust product and pricing information are a keystroke away. Real-time inventory accuracy helps order writers fulfill inventory commitments, increasing customer satisfaction.

Bid Management

Use bid management features to create and copy bids, subtotal and reprice bid items, and convert bids into orders. Follow up on bids by creating bid reminders and reviewing bids that have not been converted into orders.

Management of Everyday Events

Use the system to handle everyday occurrences, like credit denials, product returns, credit and rebill transactions, and warranty tracking. Use reporting options to track trends in these areas, and reprint needed documents at will.

Quick Access to Related Features

Hot keys throughout order entry provide instant access to product features, discounts, shipment history, pricing information, and accounts receivable balances. You can schedule blanket orders, conduct credit checks, review order commitments, and check inventory availability at other locations.

Payment and Credit Management

Review invoices or orders before sending them to your customers, print consolidated invoices, and review invoices that match the criteria you specify. Monitor a customer's credit status at every stage of the order, and establish credit, past-due, and per-order limits as you like.

Operational Excellence

Use management tools to examine sales trends and to list orders that meet the criteria you specify. Uncover issues that impact profitability, view changes to orders, track sales sources, and more effectively manage your sales force.

Bid Management Overview

Use bids to give customers a price quotation, without tying up your product inventory. Unlike other sales orders, bids do not commit the inventory, so the products remain available for sale. Once the customer is ready to order, you can quickly convert the bid into an order.

The system includes many features for working with bids. For instance, the Job Bid Subtotal Maintenance screen lets you group, subtotal, and reprice bids. When you need to manage multiple bids for the same project, use the Job Bid Maintenance feature. You can also create reminders for following up on individual bids.

Creating Bids

You create a bid the same way you create any other sales order. You can change an order's mode so that it becomes a bid. For more information, see Creating and Copying Bids.

Copying Bids

If more than one customer needs a bid on similar products, there is no need to enter the same information twice. You can open an existing sales order or bid, and copy it. Then edit the new bid as needed. For more information, see Creating and Copying Bids.

Converting a Bid into an Order

You can quickly convert a bid into an order. Do this instead of retyping all the order information when the customer is ready to order. You can then edit the order as needed. For more information, see Converting Bids into Sales Orders.

Subtotaling and Repricing Bids

Use the Job Bid Subtotal Maintenance screen to group and sort the products on a sales order bid, and also display subtotals for each group. From this screen, you can also get vendor bids or procure items. Or select a subtotal group and override the pricing of the products in that group.

Maintaining Bids

Use the Job Bid Maintenance screen to track multiple bids for a job. This is handy if several of your customers are bidding on the same project. Once you create a named job bid, you can associate sales and purchase orders with it. Then you can easily review all outstanding orders related to the job bid. Once a bid is awarded, you can use the Master Job Bids features to manage a large, ongoing project.

Following Up on Bids

In addition to the Job Bid Maintenance features, the system also lets you track individual bids. When you create a bid, you can also create a Bid Follow Up reminder.

Using the Bid Follow Up queue, you can display bids, and drill down to view their details. Then contact your customers to see if they are ready to place the orders. For more information, see Following Up on Bid Reminders.

Reporting on Bids

Run the Unconverted Bids Report to list bids that have not been converted into orders. Use this report to identify old or "stale" bids that you may want to delete. One report option lets you include or exclude the Master Job Bids. For more information, see Master Job Bids Overview.

Printing Bids

If your customer has identified their own client in the Customer's Client field on the Additional Header screen, the pricing that prints on the bid will display the customer's client pricing rather than the customer's (contractor) pricing.

Creating and Copying Bids

Create a sales order bid when your customer needs a price quotation, but is not ready to order. A bid is similar to other sales orders, but does not tie up inventory. When your customer is ready to order, you can quickly convert the bid into an order.

Once you create a bid, you can use the Copy to Sales Order Bid screen to copy it. This is useful if you need a similar price quote for the same or another customer. After you copy a bid, you can edit the new bid as needed.

> **Note:** The system uses the home branch for current user as the G/L branch on copied orders.

Use the **Disallow Copying Of COGS Or Cost To A New Sales Order Bid** control maintenance record to restrict users from copying cost of goods sold (COGS) or Cost information from an existing sales order to a new sales order bid regardless of their permissions.

To create a bid:

1. From the **Orders** menu, select **Sales Order Entry**.
2. In the **Ship To** field, enter the customer.
3. Use the **Mode** hot key, and from the list of options that displays, select **Bid**. When you return to the Body screen, notice that the word "Bid" now displays, appended to the order number.
4. Complete and save the sales order as usual.

   Note: A single sales order can contain items being bid on, along with items actually being ordered. To change a selected line item to a Bid status, use the **ShipDates** hot key, then select the **New** option to display the Create New Order Generation screen. In the **Enter New Status field**, enter **B**. Specify new dates or a different shipping branch if needed.

To copy a bid:

1. From the **Orders** menu, select **Sales Order Entry**.
2. In the **Ship To** field, enter the customer.
3. Use the **Mode** hot key, and then select the **Copy to Sales Order Bid** option to display the Copy to Sales Order Bid screen.

   Note: You may be prompted to enter a sales source.

4. Specify the field information below, as needed.

Field	Description
Enter Price Branch	The number that identifies the branch to use to determine the pricing rules for the products on the new order.

Field	Description
Enter Ship Branch	The number that identifies the branch that will ship the order to the customer.
Ship-To Same Cust? (Y/N)	Specifies whether the bid is for the same customer. If a different customer, you must review pricing (which is set as expired).
Ship-To Customer	Specifies another Ship-To customer. **Note:** If you enter a customer who is not authorized to order from the specified branch, when you use the **Begin** hot key, a prompt displays. In the **Action** field, press **F10** and select one of the following options: **Do Not Activate**, **Activate for Branch** <#>, or **Activate for One-Time Use**. If you select Do Not Activate, the system returns you to the Copy to Sales Order Bid screen; otherwise, the Sales Order Entry Body screen displays the copied bid for the new customer at the new branch.
Gens to Copy	Specifies which order generations to copy: All, Current, or Open. **Note:** If multiple generations are copied, the system combines any that it can.
Copy Original Prices? (Y/N)	Specifies whether, or how, pricing will be copied. • **Yes** - Use the prices on the current order. • **No** - Do not use the prices on the current order. • **Manual Overrides Only** - Do not use the prices on the current order, except for any manual overrides you have made. **Note:** If this flag is set to *Yes*, then the system marks all prices with an asterisk (*) on the new bid.
Copy Original Costs? (Y/N)	Specifies whether, or how, costs will be copied. • **Yes** - Use the costs on the current order. • **No** - Do not use the costs on the current order. • **Manual Overrides Only** - Do not use the costs on the current order, except for any manual overrides you have made.
Copy Original COGS? (Y/N)	Specifies whether, or how, COGS will be copied. • **Yes** - Use the COGS on the current order. • **No** - Do not use the COGS on the current order. • **Manual Overrides Only** - Do not use the COGS on the current order, except for any manual overrides you have made.

5. Use the **Begin** hot key to create the bid and display the Body screen.
6. Continue entering the bid as usual.

Converting Bids into Sales Orders

Converting a bid into an order prevents you from having to retype all of the order information. When converting a bid into an order, the order generation retains the print style that is initially assigned to the bid, instead of defaulting to the print style defined in the customer record.

Use the **Recalculate COGS And COMM-COST When Changing Bid To Open Order** control maintenance record if you want the system to recalculate the cost of goods sold (COGS) and the commissions cost (COMM-COST) that were not manually overridden when a bid is changes to an open order generation. Costs that are manually overridden retain their cost calculation.

About Expired Pricing on a Bid

In order to convert a bid with expired pricing, you must be assigned both the SOE.BID.APPRV.EXPIRED and the SOE.REPRICE.BID.SELL.PRC authorization keys in addition to the usual SOE.BID.COST.EDIT and SOE.COST.EDIT authorization keys. If you do not have these authorization keys listed here and try to convert a bid with expired pricing, the system prompt you to select one of the following:

- **Abort Operation** – Cancels the conversion completely.
- **Reprice Bid** – Reprices both sell prices and COGS prices on the bid and creates an order with current pricing structures.
- **Authorize Use of Expired Pricing** – Prompts for a user name and password of a user assigned the SOE.BID.APPRV.EXPIRED authorization key to continue, and then the system uses the expired pricing for all items and creates an order.

To convert a bid into an order:

1. From the **Orders** menu, select **Sales Order Entry**.
2. Open the bid, and enter any products needed.
3. Display the order's Status screen.
4. In the **Order Status** field, enter the appropriate order status code for each order generation. For example, change the bid's **B** order status to an **A** for Ship When Available.
5. Press **Esc** to process the converted order. You may be prompted to reprice items, depending on whether the bid's pricing has expired.

   Note: Run the Unconverted Bids Report to list bids that have *not* been converted into orders. Use this report to identify old or "stale" bids that you may want to delete.

You can also convert a bid using the following methods, if desired:

- Use the Detail Scheduling screen, which is accessible using the **Detail Scheduling** hot key on the Status screen. The Detail Scheduling screen lets you simultaneously change the status of all products in a generation.
- Use the **Mode** hot key on the bid's Body screen. For example, you can change order modes to change a Bid mode into a Direct Shipment from Vendor. This method is used frequently when converting a lot item bid into an order.

Creating Bid Reminders

When you create a bid, use the Bid Follow Up screen to create reminders. Creating reminders in the system makes following up with your customers easy, because you can then use the Bid Follow Up Queue to view your bid reminders. Being proactive about bid follow up helps you turn more bids into orders.

To create or change a bid follow up reminder:

1. Create or open a sales order bid and display the order's Status screen.
2. Use the **Bid Follow Up** hot key to do one of the following:

If...	Then...
this is the first follow up for the bid	the Bid Follow Up screen displays.
you have previously entered a follow-up for this bid	a selection list displays. Select the date to change an existing follow up reminder, or select **New** to create a new one. Press **Enter** to display the Bid Follow Up screen.

3. In the **Follow Up Date** field, enter the date you want the system to add the bid reminder to the Bid Follow Up Queue.
4. In the **Follow Up By** field, enter the user ID of the person who is responsible for following up on this bid with the customer.
5. In the **Acknowledged** field, leave the **N** in the field. If you change this to **Y**, the bid will not display in the Bid Follow Up Queue.
6. In the **Comments** field, enter any needed comments.
7. If you want to remove a follow up reminder, use the **Delete** hot key.
8. Press **Esc** to save changes and exit.

Following Up on Bid Reminders

When trying to win a bid, you can remind yourself to follow up with the customer by creating a reminder. Use the Bid Follow Up Queue to follow up on these bid reminders.

To follow up on a bid:

1. From the **Orders** > **Queues** menu, select **Bid Follow Up** to display the Bid Follow Up Queue screen.
2. In the **Brch** field, enter the branch or territory for which you want to display bids. Enter **ALL** to display bids for all branches and territories.
3. In the **User ID** field, enter the user ID of the sales order writer whose bid reminders you want to follow up on. Or, leave this field blank to follow up on bid reminders for all users.
4. In the **Cut-Off Date** field, enter the last date for which to list bids.
5. Press **Enter** to display a list of bids that match your search criteria. Review the following fields:

Field	Description
Bid#	A letter **S** (sales order) and a series of numbers used to identify the order in the system.
Date	The date the bid was written.
Flw Up	The date the bid reminder was entered.
UserID	The user ID of the person responsible for following up on the bid.
Followup Comments	An explanation as to why the bid has not been converted to a sales order.

6. Use hot keys, as needed:

To...	Use this hot key...
view the bid	**View** The Sales Order Entry Body screen displays the bid in view-only mode.
edit the bid	**Edit** The Sales Order Entry Body screen displays the bid in edit mode.
flag the bid after you have followed up with the customer	**Acknowledge** The system changes the Flw Up field to *Acknwl*. The next time you display the queue, this bid will not display in the list.

Running the Unconverted Bids Report

Run the Unconverted Bids Report to list sales order bids that have not been converted into sales orders. The report lists all selected bids, except those that had any line items converted into orders. Use this report to identify old bids that you may want to delete.

You can include or exclude master job bids from the report. These master job bids, which always have an order status of Bid, let you track large projects. Exclude these when looking for ordinary bids. Another report option lets you list only the master job bids.

The report includes columns listing the following information for each bid:

- Price branch and Order ID number
- Date bid entered and the date bid expired
- Customer name
- Bid amount and any sales tax. Grand totals for these two columns also display.

To report on unconverted bids:

1. From the **Orders > Reports** menu, select **Unconverted Bids Report**.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories to report on.
3. In the **Start Date** and **End Date** fields, press **F10** and specify a calendar date range.
4. In the **Master Job Bids** field, press **F10** and specify how to handle master order job bids. Specify one of the following:
    - **Exclude** to omit master orders. This is the default.
    - **Include** to list master orders.
    - **Only** to list master orders only.
5. To further limit the report, use the **Select** hot key. This opens an Additional Selection Input screen.
6. Set options, if needed, and generate the report.

Creating Bids Using Market Basket Upload

Use the Market Basket Upload feature to create a bid that contains all of the products listed in a CSV (comma delimited) file.

This procedure contains three main steps, which you complete in the following order:

- Set up a Microsoft Excel spreadsheet that contains specific columns of information, listed in a specific order.
- Enter the products that your bid will contain on the spreadsheet, and then save the spreadsheet as a CSV (comma delimited) file.
- Import the CSV file into Sales Order Entry using the Market Basket Upload feature.

To set up a Microsoft Excel spreadsheet:

1. Open a new Microsoft Excel spreadsheet.
2. In Row 1, enter the column headings listed below. The column headings must be entered in the positions listed.

Column Heading	Excel Column Position	Description
Not Used	A	N/A (Do not use.)
Customer Part Number	B*	Customer part number on file.
Not Used	C	N/A (Do not use.)
Manufacturer Name and Part Number	D*	The manufacturer name and manufacturer part number.
Manufacturer Catalog Number	E*	The Manufacturer catalog number.
Product Description	F*	The Eclipse product description, as identified in Product Maintenance.
Unit of Measure	G	The customer's requested unit of measure for the product.
Quantity	H	The quantity being requested.
UPC Code	I*	The product UPC number.
Not Used	J	N/A (Do not use.)
Not Used	K	N/A (Do not use.)
Quoted Price	L	The total price for the full quantity of the line item. For example, if you enter "10" in the **Quantity** column, the price in the **Quoted Price** column is for *all 10 items*.
Eclipse Product ID	M	The internal product ID used within the Eclipse system.

* Eclipse will search on these columns when importing data into Sales Order Entry.

To enter bid products and save your spreadsheet as a CSV file:

1. Beginning on Row 2, enter product information.

   The following information is required for each line item you enter:

   - The Quantity being requested (column H) and
   - At least one piece of data that the system will recognize when you import the file (columns B, D, E, F, or I).

   Important: The column positions that the system searches on to find products (B, D, E, F, and I) are denoted in the table above with an asterisk (*). The system searches for these items in the following order: Eclipse Product ID, UPC code, customer part number, manufacturer catalog number, manufacturer name and part number, Eclipse product description.

   ---

2. If needed, enter any pricing information you want to apply. If you do not enter pricing information, the system prices products as it would for any other bid.

   Important: If you enter a price in the **Quoted Price** column, the price you enter represents the *total price* of that line item. For example, if you enter "10" in the **Quantity** column, the price in the **Quoted Price** column is for *all 10 items*.

   ---

3. When you are finished entering products on your spreadsheet, select **File > Save As**.
4. In the **Save in** field, select a file location somewhere under your **C:** drive and note the location.
5. In the **File name** field, enter a file name.
6. In the **Save as type** field, select **CSV (Comma delimited) (*.csv)** from the drop-down list.
7. Click **Save**.

To import the CSV file into Sales Order Entry:

1. Create a new sales order.
2. Select the **Imp** (import) hot key.
3. In the **File Format** field, press **F10** and select **Market Basket Upload**.
4. In the **DOS Path Name** field, type the file path and file name in the format **C:/FolderName/FileName** and press **Enter**.

   For example, if you named your CSV file "MarketBasketUploadXYZ.csv" and saved it in the "Bids" folder on your C drive, you would enter C:/Bids/MarketBasketUploadXYZ.csv. This field is not case-sensitive, so you can enter characters in upper or lower case.

5. Select the **Begin** hot key to import products from the CSV file.

   The system imports all of the products from the CSV file, and changes the sales order into a bid status.

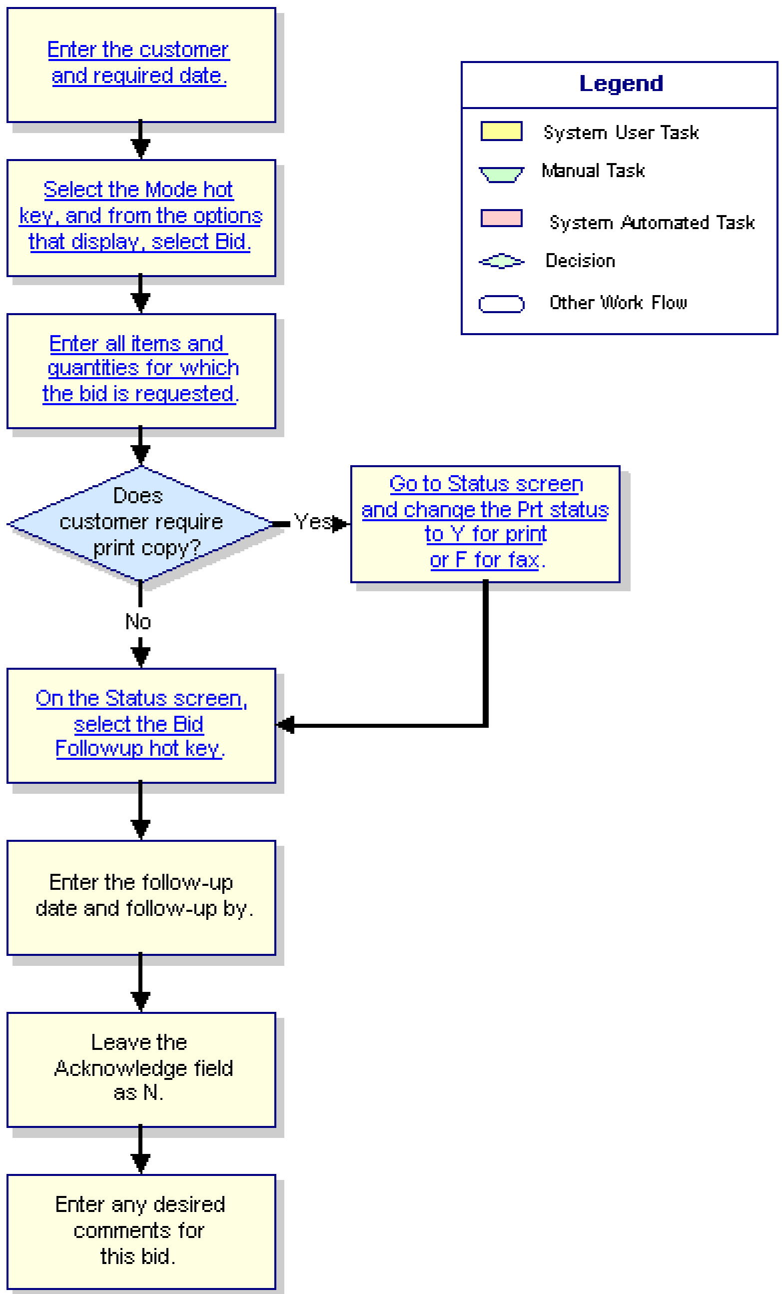
   When importing the CSV file, the system attempts to find matching products using the following criteria, *in this order*: Eclipse Product ID, UPC code, customer part number, manufacturer catalog number, manufacturer name and part number, Eclipse product description.

6. In the list of products that were imported, look for any products that the system did not find a match for. Products listed in the CSV file that the system cannot find a match for *are included on the bid*, but are listed using the generic description entered in the Default Product If Not Found control maintenance record. For research purposes, the bid displays this generic description, followed by lines of information that reflect the actual columns of data entered on the source spreadsheet.

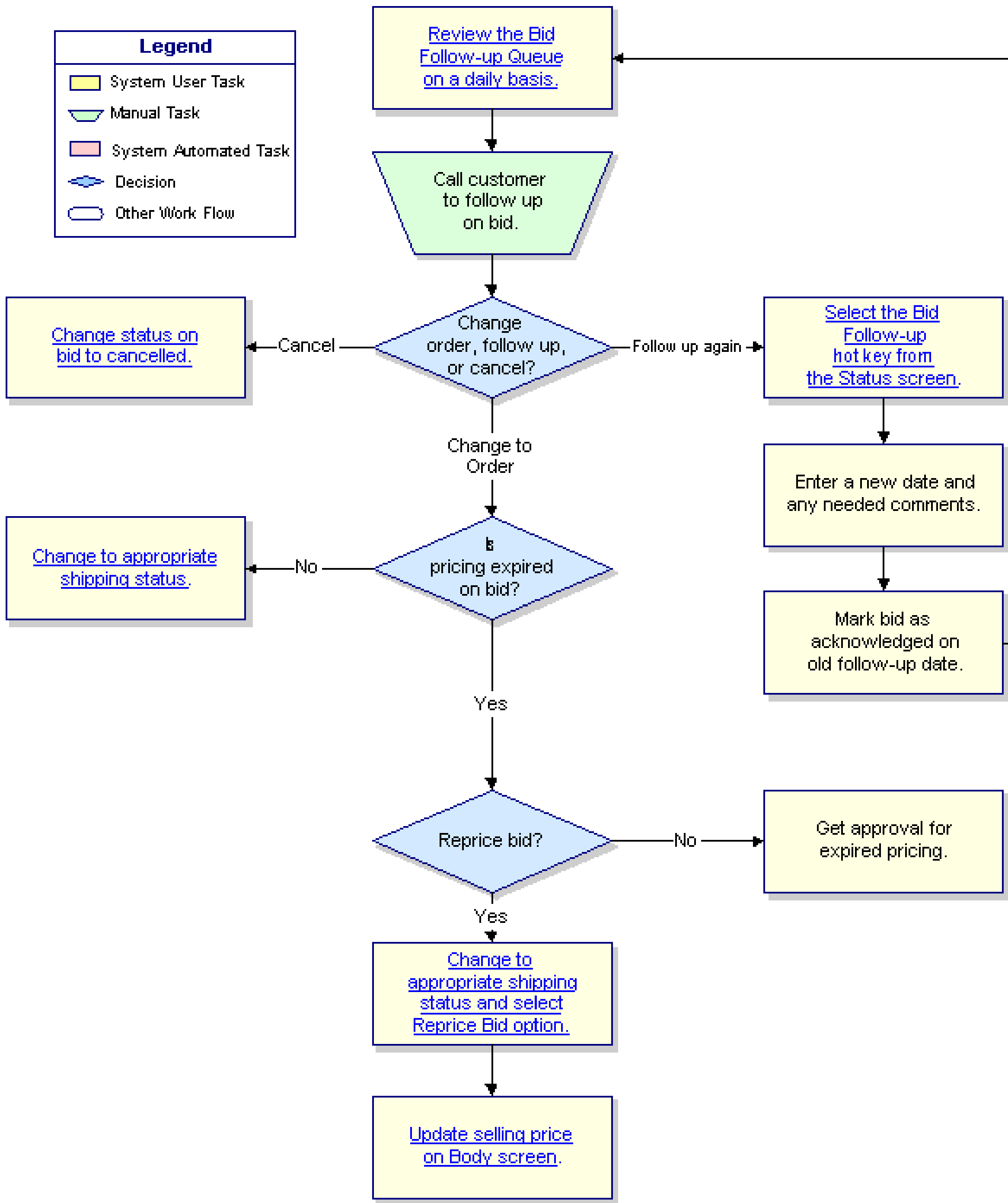
   Research any products you need to, and replace their generic descriptions with the correct product information on the Body screen.

7. Verify or adjust bid pricing and costing, as needed, and complete the bid as usual.

Bid Entry Workflow



Bid Followup Queue Workflow



Maintaining Job Bids

Use the Job Bid Maintenance screen when you need to manage multiple bids that are similar, such as when multiple customers are bidding on the same job. Once you create the named bid, you can associate sales or purchase orders with it.

You can display the screen from a menu. Also display the screen by entering **New** in the **Job Bid Name** field on a purchase order's Header screen, or on a sales order's Additional Header Information screen.

Once a bid is awarded, you can record the date and an award code that explains what happened. For example, an Underbid code indicates you lost the job to a lower bid. Create your own codes using the Valid Job Award Codes control maintenance record. After a bid is awarded, you can manage a large project using a Master Job Bid.

There are three tasks to maintaining job bids:

- Creating or maintaining job bids
- Associating sales orders with job bids
- Reviewing outstanding job bids

To create or maintain a job bid:

1. From the **Files** menu, select **Job Bid**.
2. In the **Job/New** field, do one of the following:
   - To search for an existing job bid, enter all or part of its name. Or, enter its number, preceded by a period (.). If more than one bid is found, display it by selecting it from the list.
   - To create a new bid, enter **New**.
3. Complete or review the following fields:

Field	Specifies...
Job/New	bid to search for. When found, displays the bid number.
Name	name. Enter a name that describes the job your customers are bidding on, such as Recreation Center Remodel.
Address	address for the job. Use up to two lines.
City	city. Enter the city or Zip code in this field, then select from a list if more than one match is found.
St	state. Entered automatically, based on city and Zip code.
Zip	Zip code.
Sort By	word or characters used to sort the bid in lists. For example, enter Rec to sort under the letter R.
Keywords	descriptive words used for searching, such as Rec Center.

Field	Specifies...
Award Date	date bid was awarded. Enter a date to indicate the bid process is complete. Press **F10** to use calendar.
Award Code	code word used to explain award status. For example, select Competitor to explain who was awarded the bid. Press **F10** for list.
Internal Instructions	any internal notes about the bid. This information does not show on other screens or printed forms.

4. Use hot keys as needed:

To...	Use this hot key...
review a statistical listing of sales orders related to the job bid	**Outstanding S/Os** The Outstanding Job S/Os screen displays. Drill-down to edit orders.
to review a statistical listing of purchase orders related to the job bid	**Outstanding P/Os** The Outstanding Job P/Os screen displays. Drill-down to edit orders.
delete the current bid	**Delete** Confirm when prompted. Note: You cannot delete a job bid if it has open orders attached.

5. When you are finished, press **Esc** to save changes and exit.

Associating Sales Orders with Job Bids

You can use the Job Bid Maintenance screen to track numerous bids associated with a single project.

To do this, you create a named job bid. You can then associate individual orders with that job bid. You can associate either sales order bids for your customers, or purchase order bids to your vendors. Next, you can list all the associated orders of either type from the Job Bid Maintenance screen.

If you have not already created a named job bid, you can display a blank Job Bid Maintenance screen from an order. To do so, enter **New** in the **Job Bid Name** field on a purchase order's Header screen, or on a sales order's Additional Header Information screen.

Choose one of the following instructions:

To associate a sales order with a job bid:

1. From the **Orders** menu, select **Sales Order Entry**.
2. Open or create a sales order bid.
3. From the Body screen, use the **Header** hot key to display the Header screen.
4. Use the **Add'l** hot key, then the **Add'l Header Info** hot key. This opens the Additional Header Information screen.
5. In the **Job Bid Name** field, enter the name or number of the job bid. If entering a number, precede it by a period (.).

   If prompted whether to copy this change to all open order generations, enter **Y**.
6. Press **Esc** twice to return to the bid's Header screen.
7. Complete the order as usual.

To associate a purchase order with a job bid:

1. From the **Purch** menu, select **Purchase Order Entry**.
2. Open or create a purchase order bid.
3. From the Body screen, use the **Header** hot key to display the Header screen.
4. In the **Job Bid Name** field, enter the name or number of the job bid. If entering a number, precede it with a period (.).
5. Complete the order as usual.

Reviewing Outstanding Job Bids

Use the Outstanding Job S/Os and Outstanding Job P/Os screens to review all the orders related to a single Job Bid Maintenance project.

For example, if several of your customers are bidding on the same large job, these screens let you keep track of each customer and vendor bid. One screen tracks the sales order bids; another screen tracks the vendor purchase order bids. Both screens are available using hot keys from the Job Bid Maintenance screen.

Once a bid is awarded to a customer and vendor, you can indicate which companies won.

To review outstanding job bid orders:

1. From the **Files** > **Job Bid** menu, select **Job Bid Maintenance** to display the Job Bid Maintenance screen.
2. Create or open a job bid.
3. Use one of the following hot keys:
   - To list sales orders, use the **Outstanding S/Os** hot key to display the Outstanding Job SOs screen.
   - To list purchase orders, use the **Outstanding P/Os** hot key to display the Outstanding Job POs screen.
4. Review the field information. Note that, when listing purchase orders, the **Sales $** and **GP %** fields are not applicable, which is indicated by asterisks (*).

Field	Specifies...
Job Name	name and number of the job.
Bid Order #	transaction number for the order generation.
Customer	name of Bill-To customer or vendor.
Sales $	amount of the sale.
COGS	cost of goods sold.
GP %	gross profit percentage.
Awd	company awarded the bid, indicated by an asterisk. Use the **Award Job** hot key to place the asterisk.

5. Use hot keys as needed. For example, use the **Award Job** hot key to indicate which company won the bid. Or, use the **Edit Bid** hot key to convert the bid into an order.

To...	Use this hot key...
copy a bid for another customer	**Copy Bid** The Copy to Sales Order Bid screen displays.
open the selected bid for editing	**Edit Bid**

To...	Use this hot key...
indicate that a company was awarded the bid	**Award Job** An asterisk appears in the selected **Awd** field.
create a new Ship-To account to use other shipping information	**Create ShipTo** You are asked to confirm, and the Customer Maintenance screen opens, prefilled with information from the Bill-To customer account.
open the Outstanding Job P/Os screen (available when viewing sales orders)	**Outstanding Job P/Os**
open the Outstanding Job P/Os screen (available when viewing purchase orders)	**Outstanding Job S/Os**

6. When you are finished, press **Esc** to save your changes.

Subtotaling and Repricing Job Bids

The Job Bid Subtotal Maintenance screen lets you group and sort the products on a sales order bid, and also display subtotals for each group. From this screen, you can:

- Group order items into subtotal groups.
- Manipulate subtotal groups, for instance to change shipping date or status.
- Get a vendor bid for a particular group.
- Procure subtotal group items.
- Select a subtotal group and override the pricing of the products in that group.

There are numerous reasons and ways to override the pricing of a subtotal group on a sales order bid. For example, if a vendor gives you a price break on the cost of a particular price line of products, you can pass the price break along to the customer so the bid is more competitive. You can override prices by editing field values or price formulas. You can also automatically copy the overridden pricing directly to a vendor's purchase order bid. When working with Master Job Bids, you can group by cost code, then quickly manipulate prices for all products in that cost code.

To subtotal and/or reprice a job bid:

1. Create or open a sales order and display the order's Body screen.
2. Use the **Pricing** hot key to open the Pricing Override screen, and then use its **Subtot** hot key.
3. On the Job Bid Subtotal Maintenance screen, use the **Grouping** hot key and select a Subtotal Sort option. This lets you group the order items by Sell Group, Price Line, and so on. Once items are grouped, you can edit the items as a group (to change prices, for example). The **Subtotal Group** column displays the named groups.
4. If you want to change prices, edit one or more of these fields:

Field	Specifies each group's...
Sales $	total dollar amount. Edit field to change **GP %** accordingly.
COGS $ or **Cost $**	total cost of goods sold (COGS) or total cost dollar amount. Field displays asterisks instead of COGS for users without COGS.VIEW authorization. Use **View** hot key to toggle display of **COGS $** or **Cost $** fields. Edit field to change **GP %** accordingly.
GP %	total gross profit percentage. Edit field to change **Sales $**.
Basis	price basis, used to calculate prices. Press **F10** for list.
Formula	pricing formula used with the specified basis to calculate a new **Sales $** amount.

5. Use the **Dist Method** field to determine how your price changes are distributed to the individual products within the affected group. Press **F10** and choose:
   - **Flat GP%** to change each item's price by the same percentage.
   - **Weighted Avg** to change each item's price proportionally, so the new dollar amount remains the same percentage of the total amount.
6. Use hot keys, as needed.

To...	Use this hot key...
view a statistical listing of items within a group	**View Items**
specify one order generation for subtotaling or All Ship Dates	**Ship Date** Your choice is reflected in the Ship Date field.
specify how to group items (by Sell Group, Price Line, Package, and so on)	**Grouping** **Note:** If an item is assigned to more than one sell group in Product Maintenance, only the first sell group displays.
get a price quote from a vendor	**Copy to PO Bid** You are prompted to enter a Ship From vendor and specify a COGS copy option. The Purchase Order Entry Header screen displays.
change columns in the screen view (toggle between **COGS $** or **Cost $** fields, or choose the Weight/Load Factor view)	**View**
specify a new required date and ship date, ship branch, and order status for a group	**Status**
open the Subtotal Group Procurement screen	**Procure**
change the price or cost of products in a subtotal group	**Change Prc/Cost**
open the Delete Line Items screen	**Delete** Specify a range of line items to remove from the group, or press F10 to open a selection screen.

7. Press **Esc** to save your changes and exit.

Index